

Knowledgebase > Settings > Salesperson

# Salesperson

Megan De Freitas - 2025-06-10 - Settings

## Overview

The Salesperson feature of SalesPad Cloud allows you to manage the sales associates in your company.

To get started, select **Salesperson** from the Settings menu.

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Setup		POS	Reports	Other	
Account Class Contact Method Type Customer Class Customer Type Discount Management Fee Type Interaction Type Item Class Location Payment Terms Price Level	Purchase Order Type Reason Codes Sales Document Type Sales Territory Salesperson Shipping Method Tax Codes UofM Type Vendor Class Workflow	Employees Grid Menu Setup Till Counting Till Drawer	Dynamic Grid Reports Grid Reports Import History Inventory Stock Status Report Designer	Integration Dashboard Security System Settings Manage Organization	

#### Salesperson

#### Create a SalesPerson

To create a Salesperson, click the **New Salesperson** button in the upper left-hand corner of the screen.

Salesperson	
New Salesperson	
Salesperson	

The Salesperson drawer will appear. Fill out the information fields in this drawer.

# Feedback

# Salesperson

Sales Person

Email

Initials

Sales Territory

No Sales Territory

Inactive

For a brief explanation of the different information fields in the Salesperson drawer, click here:

Salesperson

Sales Person - Allows you to give a name to your Salesperson

Email - Displays the email address of your Salesperson

Initials - Allows you to assign initials for the Salesperson

Sales Territory - Assigns a Sales Territory to your Salesperson

Inactive - If checked, this Salesperson is inactive

When you've finished entering your information, click **Save**.

## Edit a SalesPerson

To edit an existing Salesperson, first select the Salesperson from the list on the left-hand side of the Salesperson window.

Salesperson			
Salesperson			
Jack Nikcols			
Joe Bean			
Jose Martinez			
Matt Szillo			

Once you've selected the Salesperson you want to edit, make your changes in the information fields on the right-hand side of the screen.

Sales Person Joe Bean	Sales Territory North X	Email
Initials JB	Inactive	
		Save

When you've finished making your changes, click **Save**.

## See it in Action

Salespersons dropdowns appear in various places in SalesPad Cloud, including in New or Edit Customer drawers.

# **Create Customer**

Feedback

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Customer Name	
Customer Type	
No Customer Type	•
Customer Class	
No Customer Class	•
Price Level	
No Price Level	•
Salesperson	Sales Territory
No Salesperson	No Sales Territory